



Making Flexibility Work: What Managers Have Learned About Implementing Reduced-Load Work

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LIST OF PARTICIPATING ORGANIZATIONS	
United States	Canada
Agilent Bank of America Baxter Deloitte & Touche Eli Lilly General Mills Hewlett Packard IBM Medtronic Merck Marriott International Starbucks Coffee	Bank of Montreal Financial Group Ernst & Young IBM Canada Ltd. KPMG Procter & Gamble RBC Financial Group Unilever Xerox Canada Inc.

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INTRODUCTION & EXECUTIVE SUMMARY

In recent years more employers have established flexible work arrangements and informal practices to support talented individuals who want to work in different ways to accommodate shifting priorities in their personal and professional lives over the life span. Reduced-load work has developed as an important new way of working, even as work hours and workloads for managers and professionals continue to rise on the job and at home. Reduced-load work is defined as working less than full-time hours in a traditional full-time position, for a commensurate reduction in pay.

The goals of this report are 1) to report on organizational trends and learning about managing professionals working on a reduced-load basis, and 2) to provide information about long-term outcomes of reduced-load work from the perspectives of managers and employers. Although many leading firms have adopted flexible work practices over the past decades, we know that the culture in an organization can sometimes lag in supporting new ways of working, in spite of policies and systems in place. The focus in this study is to look beyond formal policies and programs and to probe how managers and executives in companies experience and view the changing nature of the workforce and different ways of working like reduced-load arrangements. To get this information, we talked with 88 managers and executives in 20 U.S. and Canadian companies representing 6 different business sectors. In each firm we interviewed 1–2 senior executives, 1–2 human resource managers with responsibility for work-life policies, and 1–4 managers with experience managing professionals in reduced-load work. With the latter group, we were able to tap into in-depth information about 67 cases of reduced-load work, plus the accumulated learnings and insights gained by those managers.

HIGHLIGHTS of FINDINGS

- Prevalence of reduced-load work increased in 60% of firms.
- Organizational culture reported more accepting of reduced load in 70% of firms.
- Reduced-load arrangements spread to new departments or functional areas or to new groups of people (e.g., men, single employees) in 50% of companies.
- Hard economic times and organizational restructuring did not necessarily have a negative impact on implementation of reduced-load arrangements – could be treated as a constraint or an opportunity.
- Change in top leadership to a CEO with high commitment to promoting work-life balance had a positive impact on reduced-load work in 35% of firms.
- Reduced-load work viewed less as a work-life program and more as a smart business practice involving effective utilization of talent in 60% of firms.
- Retention of talent reported as primary rationale for supporting reduced load. Other benefits cited included increase in productivity and improved employee relations.
- Nearly 2/3 of managers with experience supervising reduced-load professionals were highly committed to this new way of working.
- The most effective strategies to make RL work well for all stakeholders were:
 - Screening for “professional,” high performers who can be trusted to self-manage;
 - Careful attention to making work “go away” when constituting a reduced-load position;
 - Frequent communication & forward planning, continuous fine-tuning & adjustment of work load & schedule;
 - Anticipation of optimum utilization & development of talent in overall work unit, instead of focusing only on individuals requesting reduced load.
- Organizations have continued to innovate and introduce new mechanisms to enhance employee awareness of opportunities to work in different ways, and to facilitate ongoing career success regardless of use of flexibility options like reduced-load work.

In **Part I** of this report, **About the Respondents and Companies**, we describe the managers and executives who were interviewed, as well as their companies, providing overview information on the current business environment as well as financial performance and major organizational changes and challenges over the past 5–10 years.

Next, in **Part II, Organizational Climate For Reduced-Load Work**, we examine first the effects of organizational changes and challenges on reduced-load work opportunities, followed by a summary of predominant rationales given for adoption of reduced-load policies and practices. Then we examine signs of organizational support for and resistance to this new work form, and we focus specifically on human resource managers' perspectives on changes in work-life initiatives since the late '90's.

Part III, Changes in Organizational Paradigms of Reduced-Load Work, reviews previous findings on different organizational postures toward alternative work arrangements and reports on how organizations changed over 6 years.

In **Part IV, Managers' Perspectives on Managing Reduced-Load**, we focus on findings from our interviews with 41 managers who talked in-depth about their experiences supervising 67 professionals working on a reduced-load basis. We include information about the managers themselves, for example their leadership styles and attitudes toward work-life balance, as well as their first-hand accounts of negotiation, implementation and outcomes of specific reduced-load work arrangements.

In the final section of the report, **Part V, Organizational Learning: Challenges, Insights, and Innovative Approaches**, we sum up the collective wisdom of the managers with experience managing reduced-load employees and offer a wide-range of innovative ideas and practices culled from all interviews across the 20 companies.

HIGHLIGHTS of CONCLUSIONS

- The spread of reduced-load work arrangements is proceeding at a slow, but steady pace and is likely to continue;
- For professional and managerial employees, the stigma of working reduced load has lessened, and the assumption that severe career tradeoffs are necessary needs re-examination.
- Top leaders and well-placed senior managers who are committed to helping employees have a life outside work can make a huge impact on the culture of a firm.
- Formal work-life policies are helpful to implementation of reduced-load work, but even more important is the support of organizational systems (e.g. performance appraisal and development, pay, job posting, reporting relationships) that enable experimentation and flexibility in work redesign and reallocation.
- Management rhetoric & belief systems about new ways of working are critical to examine in order to understand barriers and facilitators of the spread and implementation of new ways of working.
- Organizations are responding to changing employee needs, some with more creativity, flexibility and commitment than others. Firms able to link reduced-load work to higher order change management and organizational learning are more successful at incorporating this new way of working into normal routines of running a dynamic business.
- Managers and organizations are learning, and adapting structures and systems accordingly, but there is room for much more accommodation of the needs of the new work force.

PART I: ABOUT THE RESPONDENTS & COMPANIES

About the Respondents

We conducted 3 types of interviews in 20 companies, one with a senior executive, one with a human resource manager, and a third with managers with experience managing reduced-load professionals. The managers, human resource managers, and executives we interviewed had significant organizational experience, averaging 16–18 years tenure. Most had children and employed spouses. Typical job levels of the managers we interviewed were Director level and Senior Managers. For senior executives, the most common title was Vice President. The managers and executives represented nearly all functions.

	Executives	Managers	HR Managers
Total Number Interviewed	21	41	26
% Female	58%	50%	95%
% With Children	84%	81%	90%
% With Employed Spouse	62%	60%	93%
Average Years with Company	16	18	17
Average Hours Worked / Week	55	54	50

While the executive and managerial groups were fairly evenly distributed by gender, nearly all of the human resource managers were female. Although they varied in the degree to which they were work-life specialists, all had work-life policies as part of their job responsibilities.

About the Employers

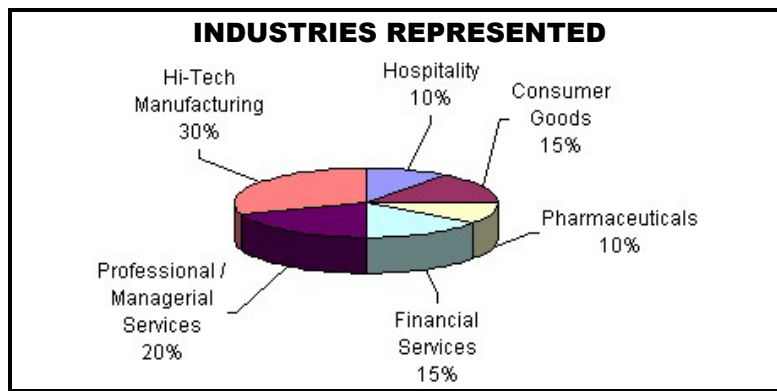
The 20 organizations in the study represent 6 business sectors: high technology manufacturing, professional and management services, financial services, pharmaceuticals, consumer goods, and hospitality. The employers were selected for participation because they had been supporting reduced-load work for professional employees for at least 6 years. Seventeen (17) of the firms participated in a previous study of reduced-load work conducted in 1996–1998 (see Lee and MacDermid, 1998). Three new firms that had a track record of supporting reduced-load work were included in order to have at least 2 firms represented in each industry. Although all of the firms in the study were larger employers, there was some dispersion in workforce size. One third of firms had 30,000 or fewer employees, 20% less than 50,000, 20% less than 100,000, and one third had over 100,000 employees.

EMPLOYER SUMMARY PROFILE

% Canadian:	40%
% with over 100K employees:	30%
Average % full-time employees:	84%
Average % part-time employees:	15%
Average % professionals:	46%
Average % female workers:	52%

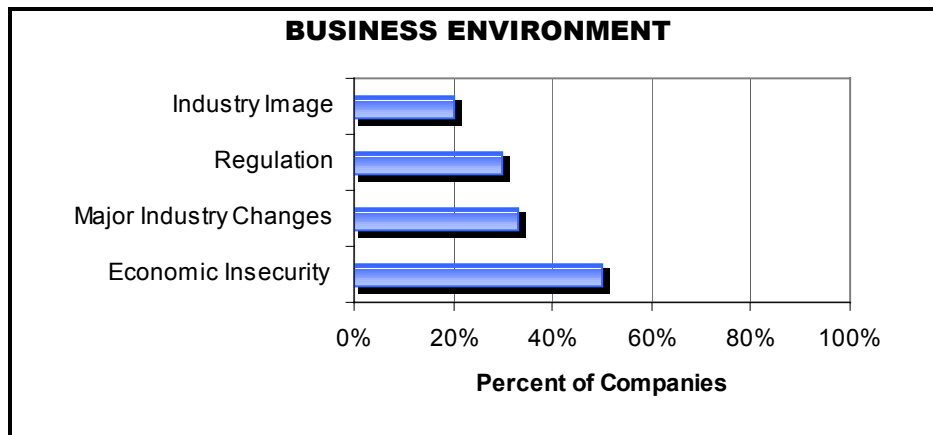
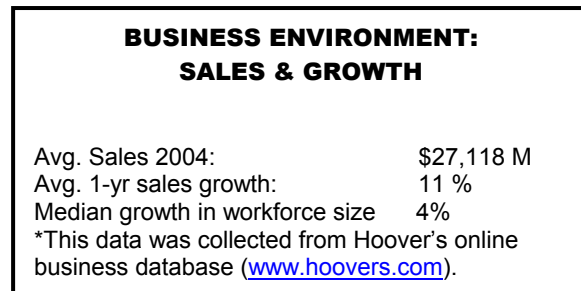
REDUCED-LOAD WORK

Reduced-load work is working less than full-time hours in a traditional full-time position for, for a commensurate reduction in pay.



Business Environment

We wanted to understand the current business context in which reduced-load work for professionals was occurring. All employers had experienced some financial growth over the past six years. At the same time nearly all had experienced key challenges in their business environments. Four main themes emerged.



Managers in half the firms mentioned *economic insecurity* as a current business environment trend. Examples included concerns about the general economy, industry collapses (dot.com, accounting problems, post 9-11 effects etc.), and “volatile and uncertain” competitive landscapes. For the other half of the sample, economic insecurity was either not mentioned, or the organization was growing at a high rate domestically, globally, or both. Managers in one third of the firms noted *major industry changes*. Examples included shifting power relationships with retailers, and changes in the structure of industry sales distribution networks. In 30% of the firms, *increased regulation* was a key trend. Examples included increased government regulation of a particular industry, or concerns over new financial reporting legislation, namely Sarbanes–Oxley, which was passed in the U.S. following the Enron and other accounting scandals necessitating greater transparency in financial reporting. As an executive remarked “It’s harder to make money... Salaries have gone up, costs have gone up, and at the same time we have to find more flexibility in the way we work.” A fourth theme, *changing public image of the industry* was noted as a concern by 20% of the firms.

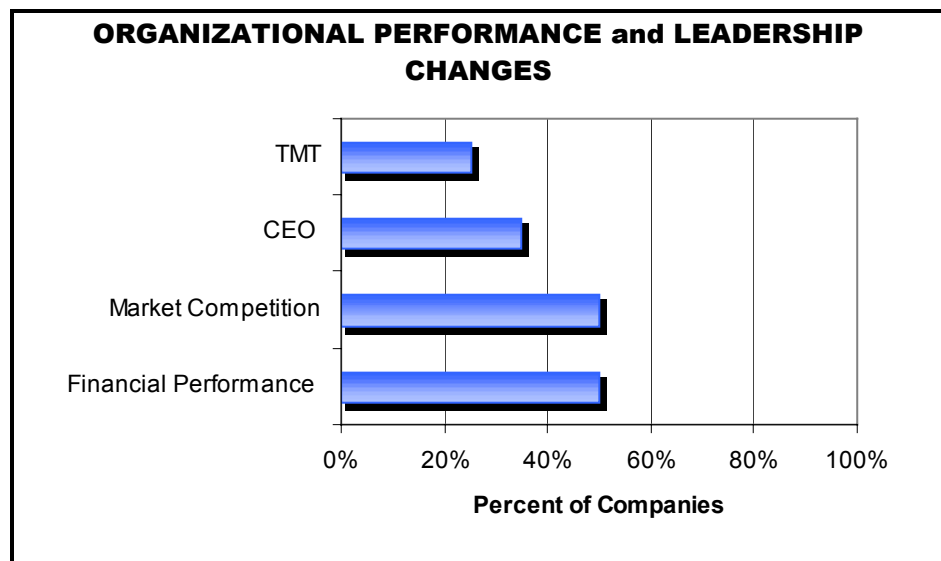
Organizational and Leadership Changes

All firms faced organizational changes that inevitably influenced the context for implementing reduced-load work. There were four recurrent themes in the kinds of changes described:

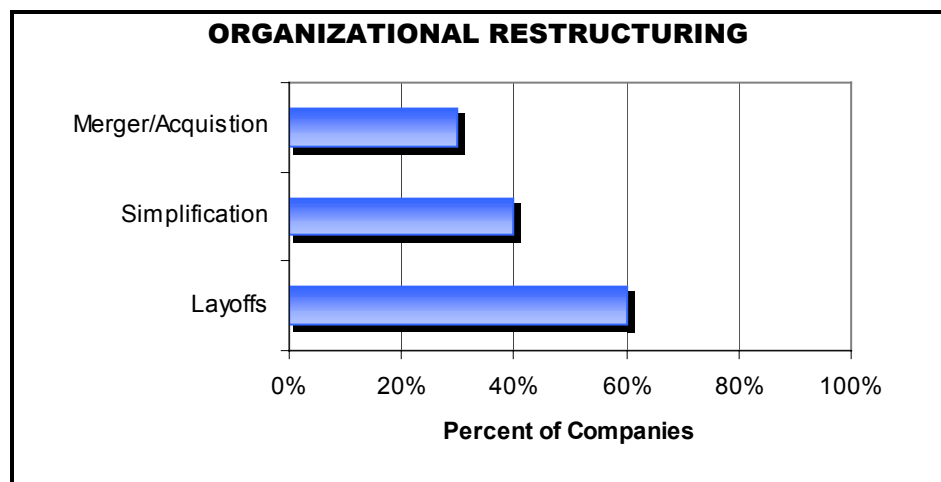
- Greater pressures for financial performance and heightened market competition;
- Major leadership changes;
- Organizational restructuring;
- Transformation of business and/or employer/employee relationships.

Increased pressure for financial performance was not surprising to find, given the business environment observations already mentioned. As a senior executive stated, “Our profession is in crisis mode.... Our strategy now is survival.” Companies concerned about financial performance were also worried over increasing expectations for financial growth by shareholders and Wall Street, or the need to turn around declining sales.

Major leadership changes were another common theme. Thirty percent of the firms had a change in their Chief Executive Officer position and twenty five percent had a change in the top management team (TMT) in addition to or other than the CEO.

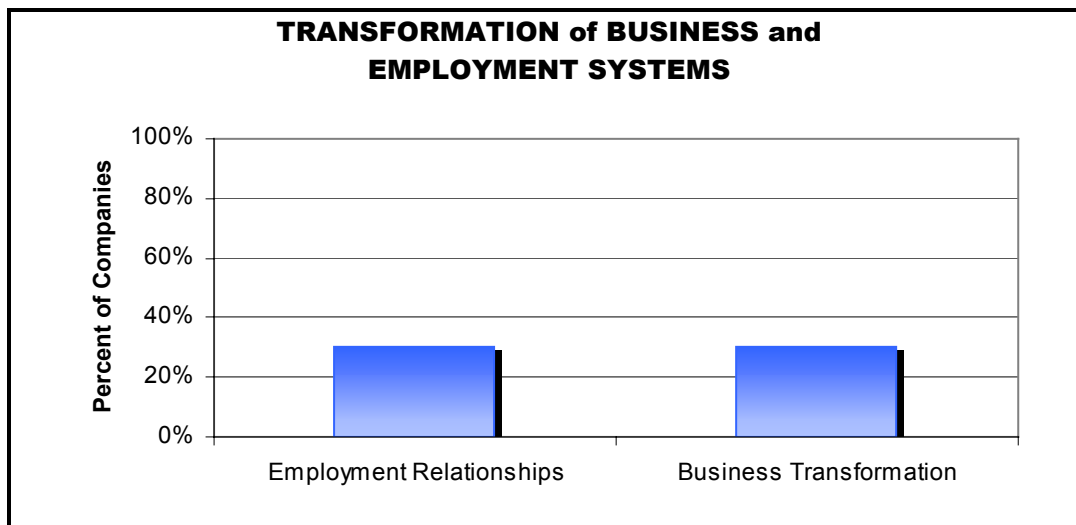


Organizational restructuring was another major challenge. Sixty percent of the sample had recently gone through *major layoffs and downsizing*. Forty percent had recently *simplified their organizational structures* and



business, such as divestiture of under-performing business units, centralization and consolidation of regional and field units into company headquarters, and spinning off companies as independent business units. About one third of the organizations had gone through a recent *merger or acquisition*.

A final set of organizational changes related to *transformation of business and employment systems*. Thirty percent of firms stated that there was a *major shift in the nature of their business*. Examples included changing from a products-based to a service-based company, shifting to a focus on customer relations, or a new emphasis on international markets. Thirty percent mentioned that *relationships with employees were changing* driven by realignment of human resource strategy toward strategic business goals and shifting more of employment cost and risk structures toward the employee. Examples included layoffs for the first time in history; moving towards more of a policy-based employment structure; moving away from a paternalistic employment relationship; changes in staffing policies (e.g., promotion, job postings), and increasing workloads.



Relationship Between Business Challenges and Organizational Growth

To explore the relationship between economic growth and business challenges, we split our sample into thirds based on their one-year sales growth in 2004 as reported by Hoovers.com. We then examined whether or not company participants had mentioned various organizational challenges. The following 2004 growth figures were used to cluster companies: low (below \$ 7.13 million), medium (\$7.14 M - \$11.5M), and high (\$ 11.5M - \$ 33.5M). As expected, lower growth companies were more likely to be concerned about layoffs and financial performance. Interestingly, across all firms regardless of actual growth rate, *rising workloads were a concern* for a majority of firms. Economic insecurity and market competition were also trends evenly distributed across firms, regardless of growth rates.

Link Between Layoffs, Workloads, and Career Opportunities

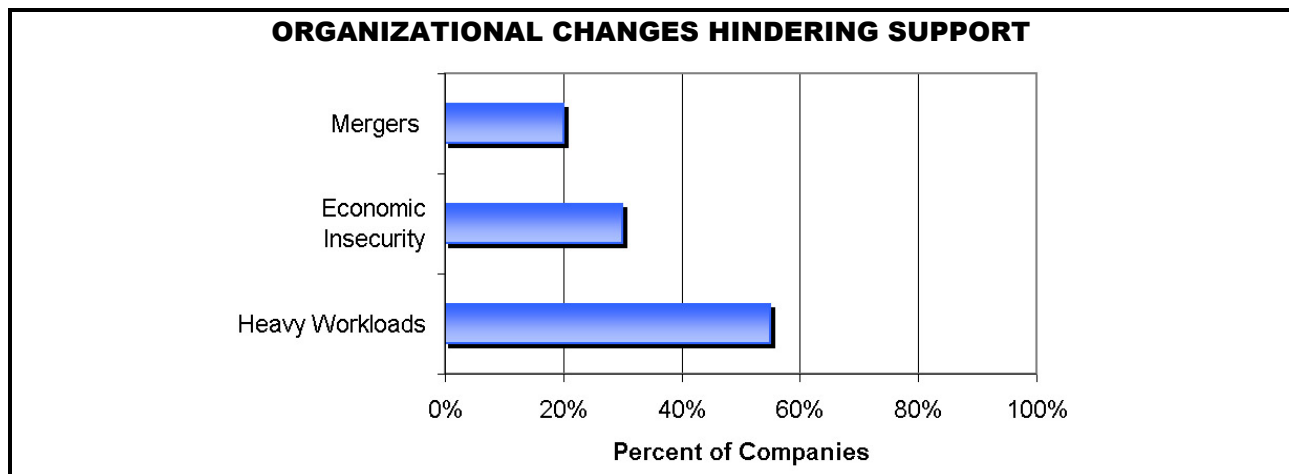
There was a link between layoffs and a concern over reduced career opportunities and rising workloads. Of those organizations that had layoffs, 60% mentioned reduced career opportunities as a problem. As one manager put it, "long work hours are a big negative especially in the difficult environment... because people aren't getting the counterbalancing goodies that have eased that pain in the past: fast track career advancement, recognition, appreciation." Twelve organizations (60%) indicated that rising workloads presented a current challenge. Of those firms that had layoffs, 80% mentioned that rising workloads were a major organizational concern.

PART II: CURRENT ORGANIZATION CLIMATE FOR REDUCED-LOAD WORK

In this section, we discuss our findings across organizations arrived at by summarizing across multiple interviews (a minimum of three) in each company. We report first on the perceived impact of organizational changes discussed above on reduced-load work arrangements. Then we present the predominant rationales given for adoption of reduced-load work practices, followed by a summary of signs of organizational support, as well as signs of organizational resistance. Finally, we provide an overview of the human resource managers' perspectives on work-life initiatives in general in their organizations.

Impact of Organizational Changes on Reduced-Load Work Arrangements

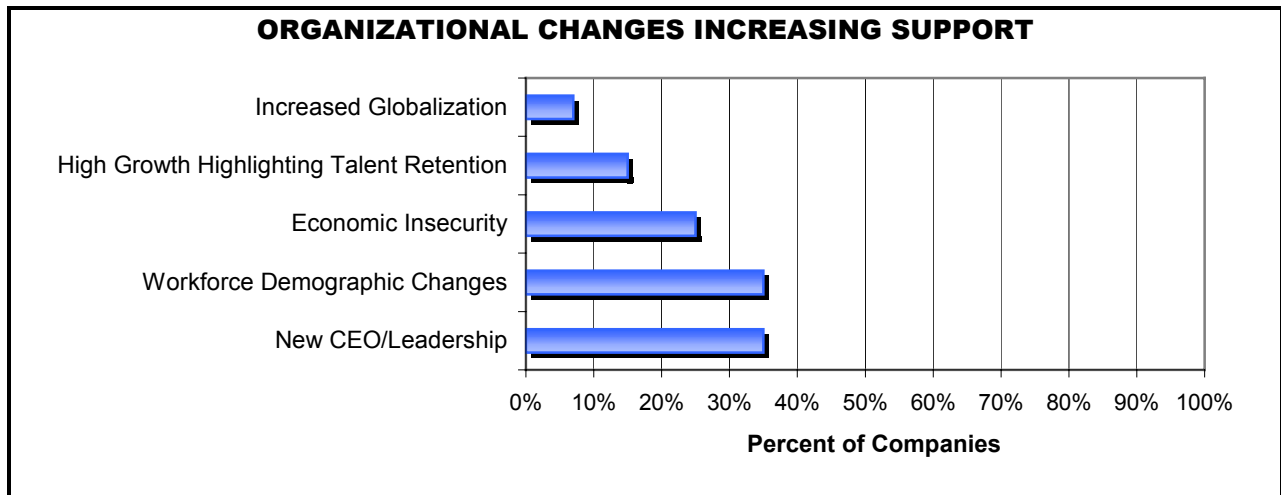
Respondents viewed some organizational changes as clear constraints on implementation of reduced-load work arrangements, whereas other changes were seen as increasing support for new ways of working.



Heavy Workloads. Respondents in fifty-five percent of the employers stated that heavy workloads present problems for reduced-load work arrangements. For example, one manager stated that “Since even people on reduced-load status are required to work more hours than they are paid for to meet their work objectives, they have a tendency to go back to being paid for full-time, feeling they might as well get paid for the long hours they are putting in.”

Economic Insecurity. Forty percent of the sample mentioned that economic insecurity, including downsizing or layoffs, presents problems for reduced-load work, because employees are nervous about going part-time under these conditions. One interviewee mentioned that due to the “economy slowdown” after 9/11, staff was reduced by 35%, which “creates a tension for work-life balance.” Another interviewee from a different firm stated “the effects of change in external environment due to scandals,” presented a significant business challenge to reduced-load work. As a manager in a third firm commented, “the extremely competitive environment ... doesn’t help” the case for reduced-load work.” Budget cutbacks can lead managers to perceive that they can’t operate with out every employee working full-time.

Mergers. Respondents in 20% of the sample mentioned that mergers had a negative impact on reduced-load work. Speaking about a recent merger, one manager said it “destroyed this culture ... reduced-load work worked in the past because the firm took an interest in a particular person, and arrangements were negotiated locally between the affected parties. Now it’s at a distance and ... fewer reduced-load arrangements are being approved.”



New President/CEO or CFO. Thirty-five percent of companies mentioned the positive impact on reduced-load work of a new leader who had a strong commitment to family and promoting work-life balance among employees. These leaders were also observed to exhibit less of a “command and control” style of leadership and to focus more on results and process.

Workforce Demographic Changes. Another 35% of companies reported that the changing workforce had a positive effect, because more employees have to juggle family and nonwork demands, which has resulted in more and more managers understanding how difficult it is to combine career and family life.

Economic Insecurity. Oddly enough, this factor, which has already been reported as hindering organizational support for reduced-load work arrangements, was also viewed in some companies as having had a positive influence on attitudes toward reduced-load work. Respondents in 25% of the companies said that downsizing, or financial difficulties, had actually put reduced-load work in a different light and increased favorable perceptions among top management. One reason for this was that talent management was viewed as more salient in hard times and made companies focus on retention of their best and brightest to help them go forward. Another reason was that employees on part-time literally cost the company less than those on full-time. Another point of view was that reduced-load work allows companies to get more done with fewer resources. One manager said, “It’s all about what resources you have, and you always have scarce resources. You know, you are never going to get it all done. So you got to get real good at defining what you can do with what you have available. In that context, it’s much easier to conceive of reduced work schedules, because it’s about getting good at making choices.”

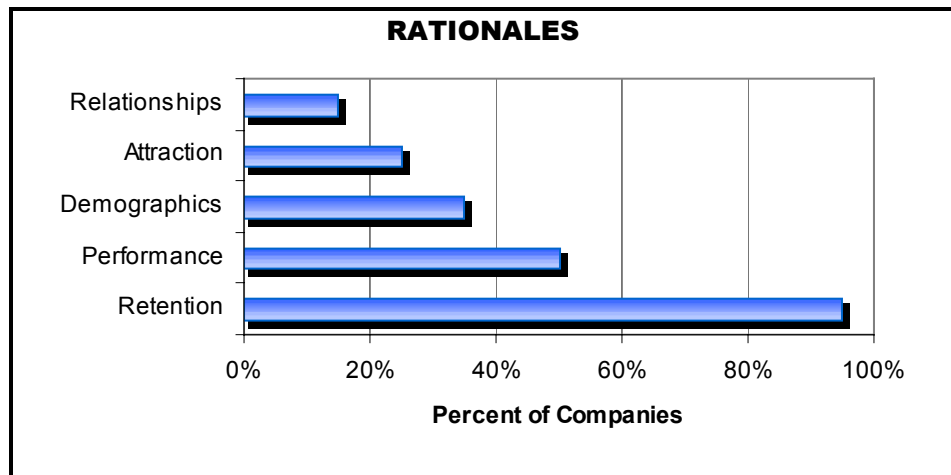
High Growth. In 15% of the firms respondents observed that the *growth rate* had had a positive effect on the climate for alternative work arrangements, because retention of talent had become more salient.

Increased Globalization. In 15% of the firms the observation was made that the organizational climate was more accepting of reduced-load work, because their employers were *more global*, with more transactions carried out electronically, which increases everyone’s awareness that “face-time” is not that critical.

Rationales for Supporting Reduced-Load Work

Across all interviews conducted, many rationales were given for organizations supporting reduced-load work, and many respondents presented a very convincing business case of how such practices benefit their firms. Below we first provide a summary of the most common themes found across organizations. In addition we use the views of executives in each firm to flesh out the general themes, as we found they have a unique perspective on new ways of working that balances business and human resource concerns.

Retention. Virtually every employer in our study viewed employee retention as a primary reason for supporting reduced-load work. As one manager stated, reduced-load work allows “you to maintain... productive workers who would not be able to stay



otherwise.” While general employee retention was the most common rationale for supporting reduced-load work across all interviews, when breaking out the views of executives, they were particularly likely to frame *retention as focused on some of the most talented employees*. Half the executives mentioned that this way of working was particularly valued by top performers. As one stated, (the) “benefit to the company is to attract and retain the best talent.” Another remarked, “The gain of this arrangement is we retained a really high level, high performing person.”

Performance, Productivity, Focus, and Efficiencies. Across all interviews, reduced-load work was mentioned by 50% of the respondents as a means to enhance employee productivity.. One manager stated that, “Part-time people are more focused than full-time people,” because they have less time to fulfill their work demands.” Breaking out the executive view, one fifth of the executives (20%) also saw *increased productivity* as a rationale. As one explained, persons working on reduced load are “very focused and organized and productive when they are here.” A related sub-theme mentioned by a small number of the executives (10%) was that reduced-load work creates *efficiencies*. As one executive said, “It forces you to be creative and scrutinize more carefully what you are doing and whether you really need to be doing it, or find a way to do it differently, (and get the same outcome with less time).”

Demographics and Diversity. Participants from 35% of the employers said that demographics and diversity were primary reasons for supporting reduced-load work. A typical comment was, “We

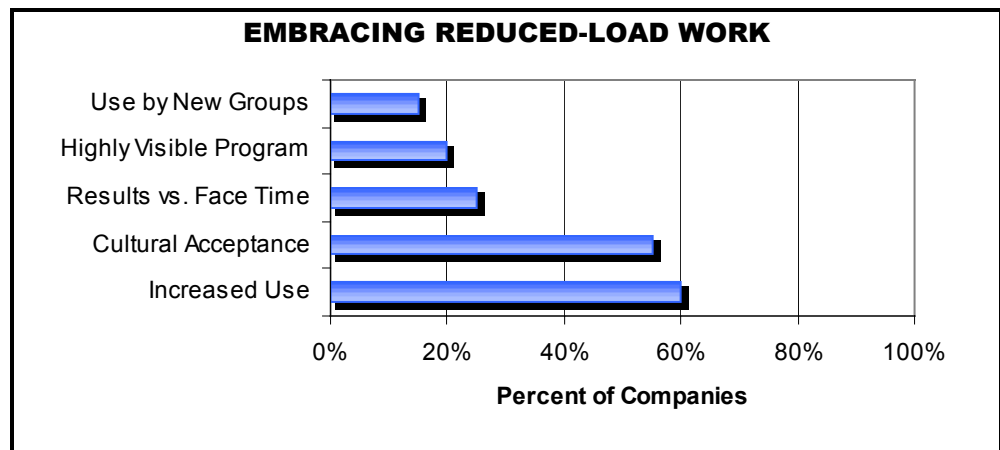
fundamentally believe that to get the best business results we need to hire the best people and that talent is distributed equally among all people, whether they're women or visible minorities, people with different backgrounds." Another manager said that supporting reduced-load work was important because, "Just by looking and seeing not very many women in the key senior roles suggests that we have to do something." Ten percent of the executives mentioned the greater appeal of reduced-load work to specific age cohorts. An example of a representative comment was: reduced-load work "appeals to generation x, aging boomers." Thus, some executives took a broad view of diversity and saw age-related diversity over the life span as also justifying the need for reduced-load work.

Attraction. Attracting top talent was an important reason for supporting reduced-load for participants from 25% of the companies. One manager explained that having reduced-load work available provides an important value proposition to potential talent. Some executives (10%) mentioned attraction as a benefit of reduced-load work that was linked to a human resource strategy of being an employer of choice. As one executive commented, "Having the opportunity for people to work reduced load differentiates (us) from other employers."

Co-Worker Relationships. In 15% of the firms, reduced-load work was seen as enhancing co-worker relationships and communication. As a manager stated, "It improves the working relationship of the people within the group, makes it more comfortable, more collegial." He explained that people were more likely to share their personal needs and coordinate work with each other. Another manager in a different firm commented that reduced-load work actually improved team communication, because when one employee was crunched for time and someone working in their unit wasn't, the first would ask for help from the other, which enhanced communication and cross-training.

Signs of Current Organizational Support

In each organization, we asked interviewees how reduced-load work was currently viewed, and five themes emerged as signs of organizational support, and though less



prevalent, four themes emerged related to organizational resistance.

Increased Use. Participants from 60% of the companies in our sample mentioned that it was no longer considered abnormal to have professionals working on a reduced-load basis in the organization. Reduced-load work was seen as more prevalent and not restricted to just a few positions. There was consensus that *reduced-load work had grown*, and that there were more professionals working in this way than there were 6 years earlier. In 15% of the companies there had been a small amount of growth, and in another 15% no growth at all.

Cultural Acceptance. Respondents in over 55% of the firms indicated that the culture of their companies was accepting of reduced-load work and that having professionals who work reduced load was seen as “normal and common.” In terms of changes over time, an even higher percentage of firms (70%) reported an organizational climate that was *more accepting* of reduced-load work arrangements than 6 years earlier; the consensus was that there was greater openness to different ways of working in general. In 35% of firms the perception was that reduced-load work was now just part of a bigger picture of new ways of working being treated as almost routine. In 30% of firms we heard that the spread of reduced-load work was partly happening as a result of *2nd and 3rd generation effects*. Individuals who experienced success in their own alternative work arrangements were then more likely to support requests of their own direct reports at a later time, who were then more likely to support their direct reports as well, which resulted in a “cascading down” phenomenon. However, in 40% of the firms the consensus was that it is still very difficult to achieve career advancement while working on a reduced-load basis.

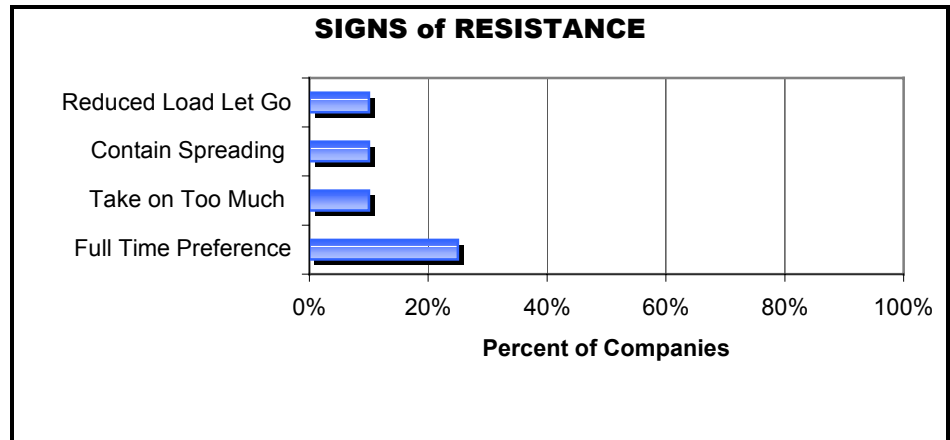
Use by New Groups. Participants from 50% of the companies mentioned that reduced-load work had spread either to new areas of the firm or to new demographic groups. For instance, in one firm reduced-load work was originally only found at corporate headquarters, whereas now there are people in production or front-line service groups utilizing this arrangement. Another firm reported that whereas originally reduced-load work had been used by mothers, it is now an option used by nearly all demographic groups. In 30% of firms it was observed that there were more men working on a reduced-load basis. In 15% of firms it was mentioned that reduced-load work options were being used to *bring retirees back* from retirement to continue to make a much needed contribution.

Results Versus “Face” Time. One fourth (25%) of the companies stated that a key reason that reduced-load work was accepted was because leaders and managers were placing a greater emphasis on business results instead of “face” time. In these firms, “face” time was not important. The perception was that people work different schedules to suit themselves. For example, as an executive in one firm commented: “We keep telling our managers, ‘It’s not...hours... It is results.’” Another organization had been training managers as part of a workforce management strategy, to look at results and productivity as opposed to “face” time, time in the office, or number of hours worked.

Accessible and Visible. Participants from 25% of the companies indicated that reduced-load work arrangements were offered as a result of a highly visible policy that made this type of flexibility easily accessible. As an interviewee explained, “The company has put on the table that almost anyone can request a RL position and HR will work with the manager to try to make it happen.” In terms of change over time, an even higher percentage of firms (45%) reported that there was *more focus on “flexibility” in general, both formal and informal*, than 6 years earlier, and that employees mix reduced-load work arrangements with other flexibility options including leaves of absence, working from home, and compressed work weeks.

Signs of Resistance in Some Firms or Organizational Pockets

While reports from the majority of organizations indicated increased utilization and many signs of current support for reduced-load work, there was clearly evidence of signs of resistance in some firms or pockets



of firms. This suggests that diffusion and cultural acceptance is still progressing and has the potential to further increase.

Full-Time Preference. Participants from 25% of the firms mentioned a preference for full-time employees. In these firms, some managers stated they felt more comfortable with and preferred to have full-time employees.

Take on Too Much Work. Participants from 10% of the firms stated that a recurring problem with reduced-load work is that the employee takes on too much work and is not paid commensurately.

Contain Spreading. Participants from 10% of the organizations stated that while value is seen in offering reduced-load work, expanding its use across the organization is not supported.

Reduced-Load Employees More at Risk for Job Loss. In a small number of firms facing hard economic times (10%), persons working reduced load were let go or encouraged to work full-time. In one firm, after a merger, a lot of people who were let go had been working part-time, and individuals were told that they had to work full-time if they wanted to keep their jobs. Another participant from a different firm indicated that during a downsizing campaign, persons working reduced load were the first to be laid-off.

Human Resource Perspectives on Work-Life Initiatives

We asked human resource managers about changes they had observed over the past 5–10 years in work-life and reduced-load policies and practices in their organizations and also what work-life programs were the most popular. Fifty-five percent of the companies mentioned an increase or expansion of employee-supportive policies, for example offering “Summer Fridays” (the option of taking Friday afternoons off if work has been taken care of) to a year-round practice. Other examples included providing universal access to reduced-load work, moving to formal contracts with reduced-load arrangements, and integrating reduced-load work opportunities into the internal job posting system. Thirty percent of companies had also developed an *employee tool kit and request form online* to make employees more aware of work-life policies and programs.

As for the most popular work-life programs, in 25% of the companies human resource managers suggested telecommuting was most popular. In 20% of companies it was flexible work hours. Job sharing and reduced load work were each viewed as most popular in 15% of the companies.

Although this study focused on reduced-load work, virtual work emerged as a growing work form that was increasingly being used by all professionals and sometimes in combination with RL work. As one manager explained, "With such a dispersed work force, and with so much business being conducted on the web and via e-mail and telephone, it is not really possible to conduct much business face to face. Therefore, many employees work from home, and the company does a good job setting people up with well-equipped home offices."

The managers we spoke with discussed how working remotely helped with their work-life balance and allowed them to perform better, yet also sometimes caused them to be overworked. Several participants mentioned that working remotely enhanced their creativity and performance. One participant somewhat humorously explained, "When I am running around in shorts and having a glass of wine, I am a lot more creative." An HR manager quoted a senior vice president who said that there are days when the company would be better off if he didn't come in because his mind is somewhere else. So on those days he would work from home or take the day off so that he was less distracted from his work. Another manager explained that although some of the people who work from home use the opportunity to do laundry, etc., she thinks that despite that, they're often more productive because they're not being interrupted.

Despite the fact that working remotely can enhance creativity and productivity while minimizing distractions, some managers also reported that the opportunity to work away from the office can also present challenges for work-life integration. For instance, several participants indicated that when employees work at home they can't easily shut the work off and that this makes "working all the time even more tempting." Participants also indicated that this type of arrangement also makes it easier for managers to call on employees when they are not at the office.

PART III: CHANGES IN ORGANIZATIONAL PARADIGMS OF REDUCED-LOAD WORK

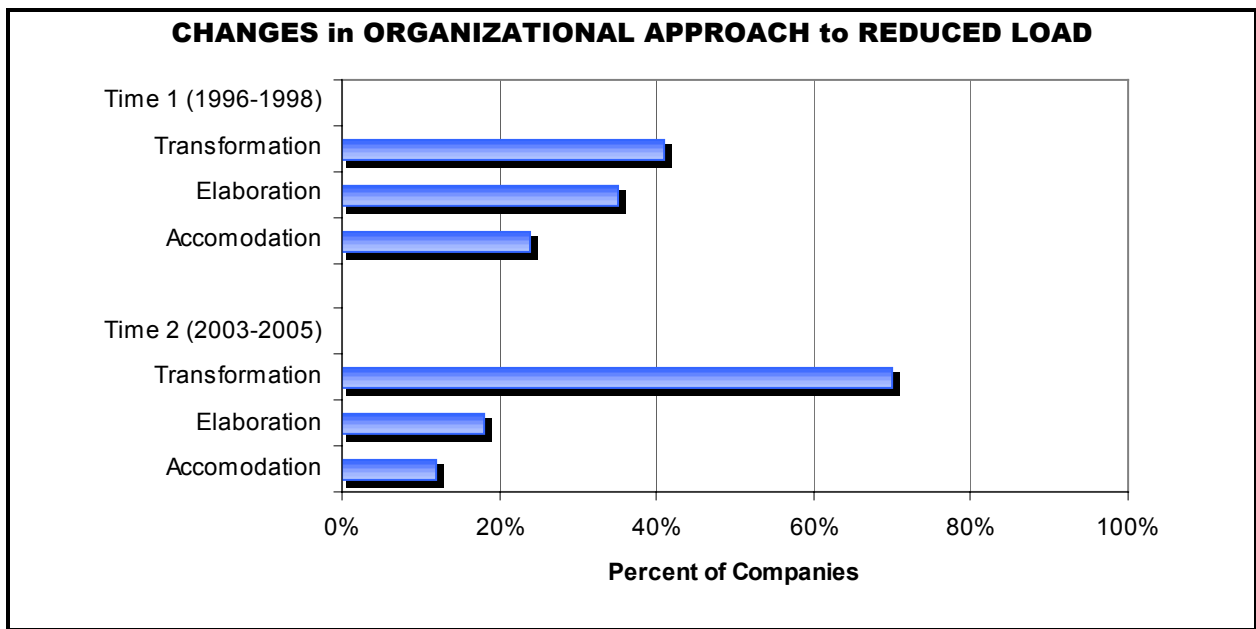
In the earlier study conducted in 1996–98, our analyses revealed three different organizational stances toward alternative work arrangements: Accommodation, Elaboration, and Transformation. The dimensions that distinguish these paradigms are shown at the left side of the table below.

	ACCOMMODATION	ELABORATION	TRANSFORMATION
Negotiations	Guided by the individual situation – firm reluctant	Guided by policy and culture	Guided by individual situation and culture
Responsibility	Onus is on the individual	Policies & programs plus the individual	Shared by individual and his/her manager
Employer Rationale	<ul style="list-style-type: none"> - Financial benefits - Increased productivity - Retain valued individual 	<ul style="list-style-type: none"> - Retention - Helps meet diversity - Getting on work/life bandwagon 	<ul style="list-style-type: none"> - Business needs - Organizational adaptation - Recruitment & retention
Employer Posture	Acquiesce & contain	Institutionalize & manage	Experiment & learn
Career Impact	Marginalized, pressure to return to full-time	Temporarily on hold, firm continues to invest in professional development	Career is moving, promotion is possible while on reduced load

Each paradigm carries advantages and disadvantages. Within the **Accommodation** paradigm alternative work arrangements are the exception rather than the rule, with the likely result that only very high performers will seek them. Little is required of the firm, since the responsibility for success rests entirely with the individual. This paradigm may serve the interests of individuals well so long as they are willing and accept the potential of greater career tradeoffs.

Reduced-load work in the **Elaboration** paradigm exists in a context of well-articulated, and usually, well-communicated, work-life policies. This makes it less risky for individuals to ask, at least in theory, and there is less dependence on the good will of individual bosses. A disadvantage, however, is that formal policies may institutionalize alternative work arrangements in ways that interfere with success; career outcomes also are unclear. In spite of the innovation and experimentation in the Elaboration paradigm, there appears to be no real re-evaluation of the traditional career path to the top, which remains accessible only to those working full-time.

Transformation cases were found in firms that tended to have formal work-life policies and programs, but they were less detailed or were unevenly administered. The design of the reduced-load work was viewed from the perspective of the strategic direction of the firm. Negotiation depended upon a supportive boss, but there was also widespread commitment to supportiveness as a part of the organizational culture. Uneven implementation of policies was a disadvantage of this paradigm. The Transformation paradigm suggests that reduced-load work arrangements are part of a larger trend of increasingly customized work arrangements that change as a function of an employee's life stage.



Of the 17 firms who participated in both studies, at the time of the first study there were 4 categorized as **Accommodation**, 6 as **Elaboration**, and 7 as **Transformation**. At the time of the current study there were 2 firms clearly in the **Accommodation** paradigm, 3 in **Elaboration**, and 12 in **Transformation**. There was in fact a good deal of change in organizational stances over time. Only one firm maintained the same **Accommodation** paradigm, and all of the firms formerly categorized as **Elaboration** shifted to **Transformation**. These results suggest that most of the firms we studied, which were early adopters of reduced-load work, were moving toward greater embracement of this new way of working.

PART IV: MANAGERS' PERSPECTIVES ON MANAGING REDUCED-LOAD PROFESSIONALS

This section of the report is focused on the perspectives of 41 managers who had supervised at least 1 professional working on a reduced-load basis (3/4 had supervised at least 2, 1/4 5 or more). These managers talked about 1 or 2 specific cases in-depth and reflected on what they had learned in general from managing professionals working on a reduced-load basis.

SNAPSHOT of MANAGERS PROVIDING INFORMATION on 67 REDUCED-LOAD DIRECT REPORTS

- 2/3 Vice Presidents or Directors
- Diversity of Functions: Marketing/Finance (1/3); HR/Communications (1/4); Sales, Business Development, Client Services (1/4); Other (e.g. R&D, IT, Production) (1/6)
- Men (49%); Women (51%)
- Previous experience in Managing RL Work (50%); First experience managing RL (50%)
- Experienced simultaneously managing more than 1 RL arrangement at a time (50%)
- Total number of cases described: 67

Leadership Styles and Views on Work-Life Balance

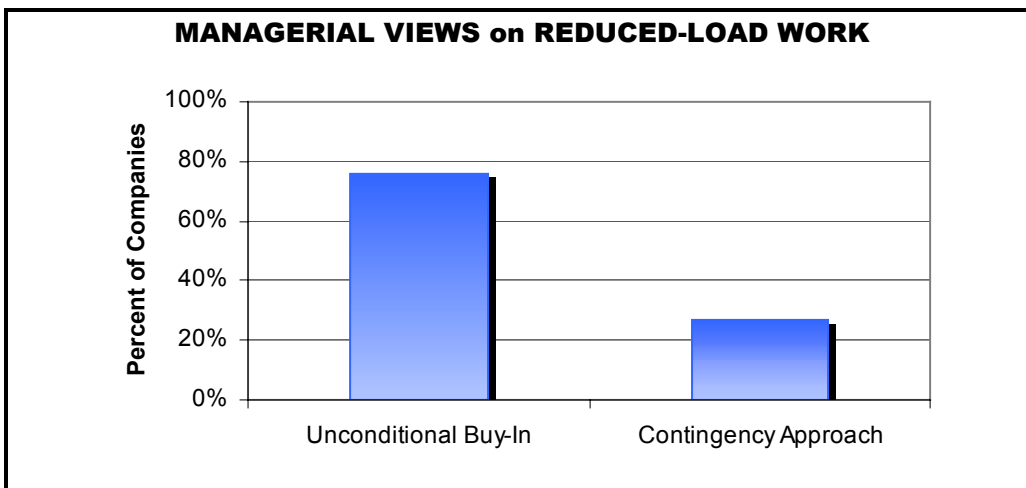
Leadership Styles. This was a very diverse group of managers who described facing very different challenges in their work units. When asked to describe their own leadership or management styles, the following recurrent themes emerged:

- **Hands-off approach**, trust direct reports to deliver results (33%)
- **People-oriented**, develop trusting relationships, stay in touch (33%)
- **Development focus**, professional and personal (20%)
- **Set high standards** and clear expectations (20%)
- **Risk taker/maverick** (10%)

Views on Organizational Role. In probing to find out what these managers' points of view were on the role of the organization in relation to employees' desires to have a life outside of work, 5 different perspectives were articulated, with many mentioning more than one:

- All **employees should have a right** to have requests for flexibility considered (50%)
- The **manager's role is to assist employees when they request** help in finding or creating more balance (40%)
- The **manager's role is to take responsibility** for the structure and allocation of work in such a way that all employees can have a life outside work (30%)
- For **talent retention** purposes the firm must offer work options that allow employees to meet their needs (20%)
- The **workforce is more diverse** today, and organizations must offer more alternative ways of working to reflect these changes and to recognize that employees have different priorities at different times in their lives (20%)

Attitudes toward Reduced-Load Work. We also asked the managers about their attitudes toward reduced-load work in general and found two broad categories of points of view. One group seemed to convey an **unconditional “buy-in”** to the idea (31 out of 41), whereas others espoused more of a contingency approach. Of those in the former group, eleven had actually worked on a reduced-load basis themselves. An additional 17 of the managers had a very positive attitude. They were *very open to trying* reduced-load work with their employees and had basically responded to requests asking themselves “how can I find a way to make this work.” There were also a few in this group who had a sort of “missionary zeal” in their approach; they wanted to encourage everyone to try it, or they wondered why more people haven’t done it. One of these managers said, “If you want to be competitive and stay in business these days, you must find ways to do more with less. The biggest expense in any company is employees, so we should be actively pursuing ways of doing things differently.” Then there were the remaining 11 managers who asserted that they thought reduced-load arrangements **could work out well under certain conditions**. The two most common conditions mentioned were: a) when you have efficient, dedicated, high performing professionals; and b) when the manager plays an active role in coordination and scopes the job well.



67 Cases of Reduced-Load Work: Negotiation, Implementation, & Outcomes

OVERVIEW of 67 REDUCED-LOAD WORK CASES

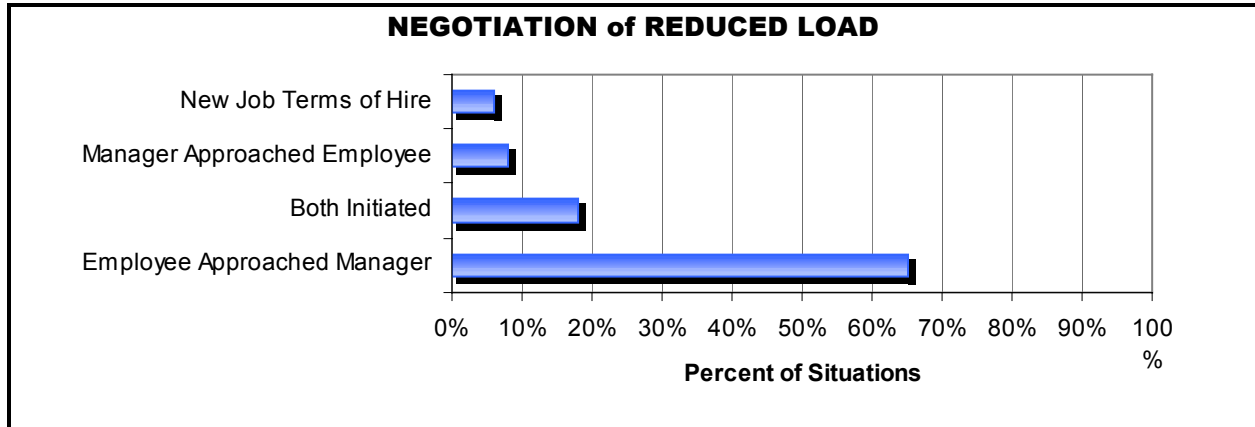
- Average load 70% of full-time
- Job Share (n=13/67)
- 50% were managers with direct reports; 50% were individual contributors
- 95% women (n=64)
- Reasons requested:
 - New baby after parental leave (24%)
 - Spend more time with children (20%)
 - Personal or family health issues (10%)^b
 - Want a less hectic life (5%)
 - Pursue higher education (3%)

Negotiation

In 16 cases the managers had “inherited” the reduced-load situation they discussed and were not aware of the negotiation process. In the remaining 51 cases, four issues were often covered: 1) how dialogue began; 2) how the manager reacted to the idea or request; 3) to what extent the negotiation involved the manager’s “boss”; and 4) what role organizational policies or programs played in the negotiation process. The chart below

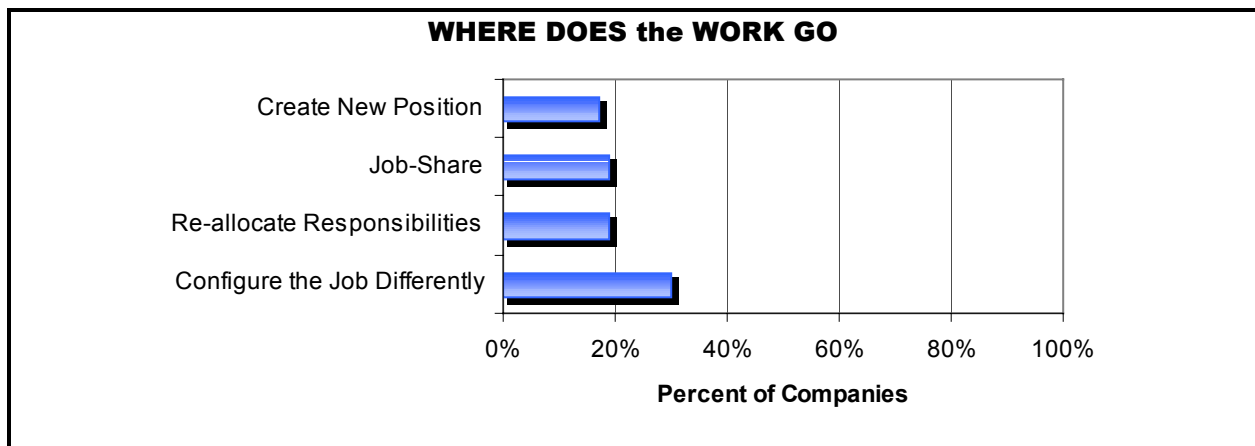
summarizes the findings about how the dialogue about reduced-load began. About $\frac{3}{4}$ of the managers indicated that they responded very positively to initial conversations with employees and wanted to support requests. About half

mentioned that they knew these individuals were high performers and that it would be to the firm's advantage to keep them. In only two cases were managers wary at first, with mixed feelings about the requests. The role of these managers' bosses in approval of reduced-load arrangements was minimal; they were generally simply kept informed as a courtesy. Organizational policies were reported as playing a critical role in negotiation of the reduced-load work arrangements in 37% of the cases. However, in 33% of the cases the managers asserted that formal policies and guidelines were irrelevant.



Implementation: Constituting a Reduced-Load Position

As shown below, there were 4 main strategies used to “make work go away” when an employee wanted to work less: 1) configuring an existing job differently; 2) reallocation of responsibilities; 3) creating a job share; and 4) creating a new position to specifications.



Configuring the job differently. This was the most frequently discussed approach to achieving a reduced-load job, and managers gave the following specific examples:

- Being selective about types of jobs you agree to modify
 - Avoid jobs involving transactional work with short-term timelines and demands dictated by external customers/clients unless you use a team approach for coverage
 - Avoid jobs prone to regular “fire drills” where unexpected urgent requests come from above with short timelines
- Limiting the number of direct reports or number of projects

- Controlling for quality of subordinates reporting to reduced-load individual
- Assign internal or long-term projects where deadlines can be easily extended
- Assign smaller number of clients, but pay attention to overall developmental opportunities
- Align individual work load with seasonal peaks and valleys of demands in work unit

Re-allocating responsibilities. Managers also used the obvious solution of shifting tasks to others in the work unit or to other temporary staff to make work go away in order to achieve a reduced load. However, managers pointed out that this was done with consideration and careful analysis of the work loads of others, so as not to create overloads for peers or subordinates in order to provide a reduced load for a colleague. In some cases there was even intentional attention given to providing developmental opportunities for others in light of the need to shift tasks and projects off one person's plate. Other managers indicated that they had used the reduced-load request as an opportunity to actually re-examine and re-organize the structure and allocation of work in the entire work unit, which often resulted in unexpected benefits.

Creating a job share between two people. Managers described a wide range of job designs, division of responsibilities, and distribution of work in this approach to constituting reduced-load work; and the arrangements had to be customized to suit the two individuals' personalities and complementary competencies. More than half involved individuals each working 3 days (60%-60%), which of course adds up to more than a single full-time position. Others involved 40%-60% and 50%-50%. In some cases, the job responsibilities were divided in such a way that the two incumbents each had unique tasks and accountabilities, and the coordination was quite simple. In other cases, the job share team operated as a single unit (had one phone number and e-mail) and each person handled all functions including supervision of direct reports. In these cases more communication and coordination was required between the job share partners. In several cases job share arrangements involved line management positions where reduced-load work had previously been considered impossible.

Creating a position from scratch. A final way of constituting a reduced-load job was to design a new job to the amount of the desired load. This happened during downsizing in several cases where a manager was required to reduce headcount and was able to do it by finding individuals wanting voluntarily to move to 50% or 75%.

Implementation: Sustaining Reduced-Load Work over Time

There was a great deal of convergence in managers' comments about how they worked together with the individual professionals to sustain the new work arrangements and make sure there were no negative effects on the work unit. Two main themes emerged:

Close communication and ongoing problem-solving or fine-tuning of arrangements. In about 1/3 of the cases the managers had had long-standing good and trusting relationships with the reduced-load professionals, and so had a great deal of confidence in their abilities and commitment to the organization. But managers also reported this approach when they had not formerly worked with these individuals. Regardless of the extent of a prior relationship, managers mentioned the importance of checking on whether the scope of the job was still reasonable, as professional positions are infamous for not being "fixed" or finite, with more things tending to get added all the time. These managers were insistent on making sure that their professionals on reduced-load were not "over-working," because they recognized that this was a fast track to failure and dissatisfaction.

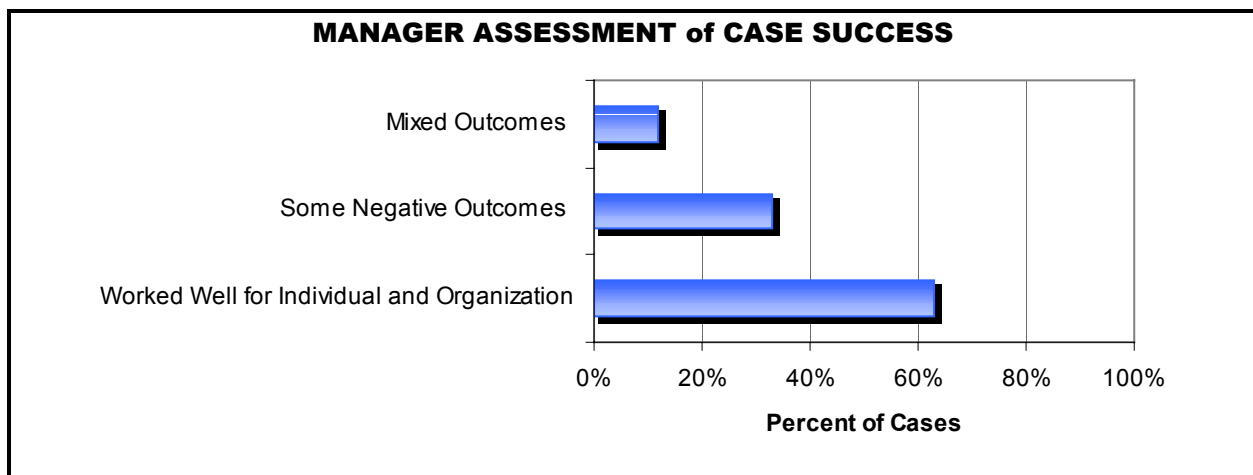
They made the assumption that reduced-load work arrangements required an ongoing process of fine-tuning, adjusting, and improvising according to what was going on in the work unit as well as in individuals' lives outside of work.

Coordination. Most managers reported that the individual professionals took charge of managing their own schedules and client relationships, but the managers took responsibility for scheduling department meetings to accommodate different work arrangements most of the time. However, a number of managers mentioned that it was essential for reduced-load professionals to be flexible on an occasional basis in coming into the office for a special meeting or event, even if it fell on their usual day off.

Outcomes

Overall Success of the 67 Cases. We expected that most of the cases that we heard about would be more successful than less successful, as the selection of the sample involved finding managers willing to talk about their experiences managing reduced-load professionals. We assumed those with less positive experiences would be less likely to want to be interviewed. In fact, 50 of the 67 cases were evaluated by the Interviewers, on a scale of 1 to 5, as highly successful, with ratings of '4' or '5,' and only 7 cases were clearly not successful, with ratings of '1' or '2.' All of the job share cases were rated as highly successful, and the reduced-load cases with higher percentages of full-time (e.g. 75–80%) tended to be rated as more successful than those with lower percentages of full-time (60–65%). The chart below shows the percentage of cases managers reported as successful from the point of view of multiple stakeholders.

When things worked well for the individual and the organization (63%), individuals got the extra time they wanted and achieved a better work-life balance and companies were able to retain highly talented and productive employees. More specifics on cases where there were negative or mixed outcomes can be found in the next section on *benefits and costs*.



Benefits & Costs of Reduced Load. Managers talked a great deal about some of the benefits and costs of reduced-load work from the points of view of the work unit and the organization, as well as individual career advancement. There were mostly benefits mentioned with respect to family outcomes. Reduced-load professionals gained the time they needed and wanted for themselves and their families in 93% of the cases discussed. There were a few cases where managers observed that

individuals were too devoted to making sure the work got done at the expense of time for children and family.

Work Unit/Organization. As shown below, a variety of kinds of benefits of reduced-load work were mentioned in relation to the work unit or organization in the cases where the arrangements were considered successful. Costs were mentioned much less frequently, but the most common ones are shown below.

- | BENEFITS |
|---|
| <ul style="list-style-type: none">• Reduced-load professionals typically high-performers• Lower turnover• Better team functioning• Increased commitment, enthusiasm & creativity |

- | COSTS |
|--|
| <ul style="list-style-type: none">• Hard to schedule meetings• Co-worker resentment• Negative impact on work unit productivity |

Managers often mentioned that reduced-load employees were virtually irreplaceable. For example one bank manager commented: ... he is so good that he gets more done in 4 days what most others could do in 5.” Or in the case of a job share arrangement: “The two of them together have an incredible span of complementary skills leading to better decisions, no question.” As for work unit benefits, one manager talked about his ability to maintain a 0% turnover rate in his region (compared to 7 or 8% in the rest of the company) by offering professionals alternative work arrangements. Several managers believed that the challenge of having someone on reduced-load promoted better communication and team work as well as cross-training, out of necessity. One manager gave the example of how members of his team became more aware of the interdependencies within the group, which improved

their functioning. In some cases the work units achieved streamlining of their operations and got rid of extraneous or redundant tasks in the process of figuring out a way to accommodate professionals seeking to work less.

Individual Career Advancement. Although it is usually assumed that employees who choose to work on a reduced-load basis will have to sacrifice career progress as a result, we found some very positive results that suggest this belief does not necessarily reflect the realities of experienced managers of reduced-load professionals. While managers did mention some specific costs that reduced load may entail in terms of individual career advancement, overall they were quite optimistic in general about career opportunities in their organizations.

- | BENEFITS |
|---|
| <ul style="list-style-type: none">• Actual promotions received while on reduced load (16% of cases)• Reduced-load employees NOT less promotable• Excellent career opportunities for reduced-load professionals• Career advancement retarded only in proportion to lesser experience gained |

- | COSTS |
|---|
| <ul style="list-style-type: none">• Professional development may suffer• Some organizational members think that reduced-load employees can't make a significant contribution• Managers find it hard to conduct fair performance evaluations |

PART V: ORGANIZATIONAL LEARNING: CHALLENGES, INSIGHTS & INNOVATIVE APPROACHES

In this closing section of the report, we share organizational learning and managers' collective managerial wisdom regarding challenges and insights of implementing reduced-load work, other innovative approaches to managing flexibility and highlights of conclusions.

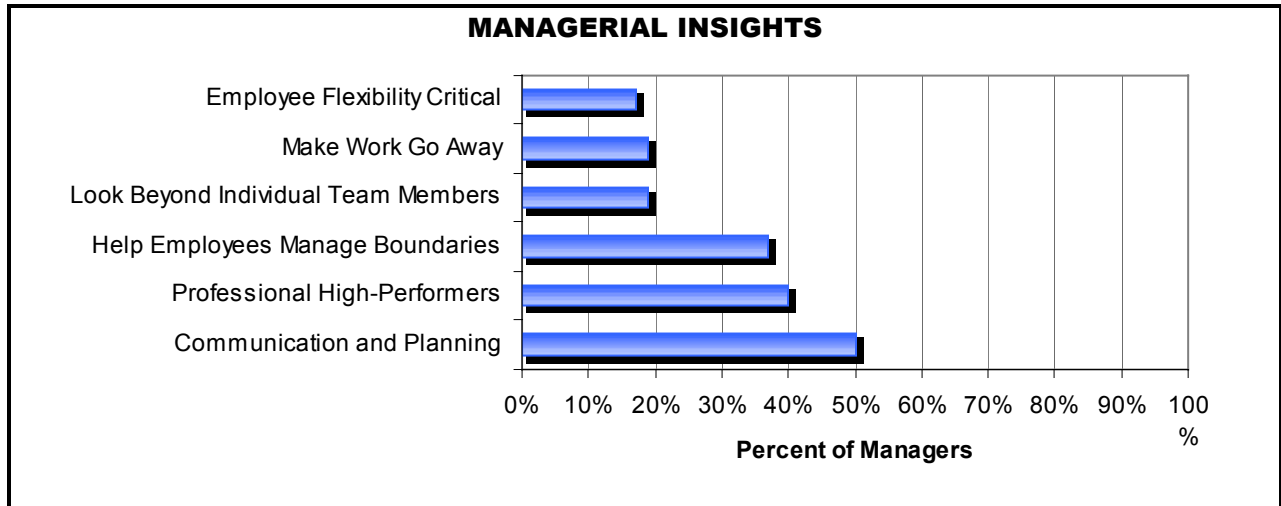
Challenges & Insights

Challenges. The collective wisdom about the biggest challenges involved in managing reduced-load professionals was quite revealing and also inspiring, because the four main themes that emerged indicate how important it is for managers to be empathetic and actively involved in making these arrangements work. The most dominant theme, mentioned by 39% of the managers was *scoping reduced-load jobs right*, which meant finding creative ways to eliminate pieces of the work or to combine tasks in the case of job sharing. Twenty-two percent (22%) of the managers talked about the challenge of *helping individuals set boundaries and protecting them from stress and "job creep."* They understood that employees working reduced-load are often reluctant to bring up load issues with their managers for fear of losing the arrangement or being viewed negatively since many managerial cultures do not support this as a norm. The third common theme found among 17% of these managers was *respecting individuals' work load reduction while still meeting work unit goals* without the manager getting overloaded. Good managers know that it's always challenging to meet organizational goals while attending to the needs of employees at the same time. But it doesn't work for the manager to take up the slack or act as a buffer. Finally, 15% of the managers mentioned the challenge of *paying attention to the developmental needs of reduced-load employees*, of making sure they are properly challenged and utilized even while they work in a different way.

Insights. The most common theme in managers' reflections on what they have learned from managing reduced-load professionals was that *frequent communication and forward planning are essential*, as mentioned by over half of the managers. Since individuals are choosing to be not available for last minute, urgent bulges in work load, then there has to be better anticipation of work demands, and where possible smoothing out of these big bumps. The close communication can also lead to early detection of misunderstandings about expectations or problems in meeting commitments well-before the situation reaches crisis proportions. One manager even took it further and said that he thinks the effectiveness of his work group has improved as a result of better communications with having someone working reduced-load, because "people understand more about each others' lives outside of work and are more willing to jump in and help out.

The second most frequently mentioned insight that 41% of the managers brought up was that for the best results with reduced-load arrangements, *employees should be professional, high performers and trusted to self-manage*. Some managers took this further and commented that they had found that employees requesting to work reduced-load actually had unique, very valuable characteristics. They found them more creative, bringing a higher level of energy to their jobs, and more adept at setting priorities and problem solving.

Thirty-seven percent (37%) of the managers took seriously their own role in the success of reduced-load work arrangements. They suggested that it was important for them to *play a very active role in following and monitoring the arrangements to check from time to time on whether the work load was still reasonable*, to make suggestions on how employees might better “manage their plates,” and to be sure employees were not putting undue pressure on themselves. Again and again it was mentioned that expectations and accountabilities must be clear.



Another interesting insight mentioned by 19% of the managers was that they realized they *needed to look beyond individual members' of their teams* who wanted to work reduced-load. They needed to be constantly thinking of optimum utilization and development of everyone in the group. This means thinking in terms of the total “pot” of talent in the work group, in order to better anticipate potential effects of individuals shifting to reduced load. This kind of mind set allowed them to generate more creative solutions that could enable the team to actually benefit from one person cutting back.

Another 19% of the managers mentioned some tricks they had learned about *how to make work go away* when trying to constitute a reduced-load position. Some believed that reducing the number of interfaces an individual has to deal with, including the number of direct reports involved, helps keep a person’s load manageable. Others talked about having learned to just eliminate unscheduled meetings wherever possible, because they created problems with employees with different days off. Others found that they had to actually teach or coach reduced-load employees how to set and manage boundaries, or else they would tend to over-work. Finally, these managers had some insights about project work. They commented that they had learned it was important not to spread employees too thin across multiple projects, but that also it could work well to assign reduced-load professionals to fairly large clients rather than smaller ones, because then they were part of a team that could share the load naturally.

Finally, 17% of the managers talked about the importance of *flexibility on the part of reduced-load employees*. They insisted that reduced-load arrangements can only work well if individuals are able to respond to changing circumstances at work. They need to be able to adjust their schedules occasionally and remain open to unexpected organizational demands.

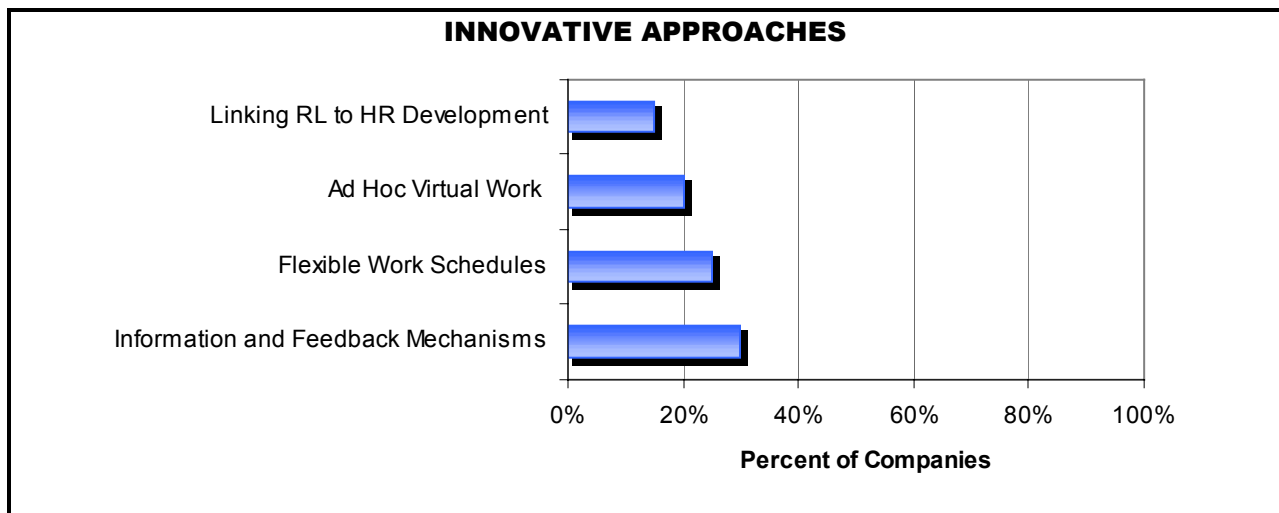
Innovative Approaches

Hands-On in the Work Unit. The managers with experience managing direct reports working reduced load mentioned several innovative approaches to managing reduced-load work that specifically related to supervision and scoping the work and work process. One was to do *long-term planning around staffing needs from an organizational point of view as well as from the point of view of team members' personal needs over time*, all the while keeping in mind the entire work unit. One manager said that the key to producing quality work and meeting commitments is having talented people in your group, so what she learned to do is “think long term and look for quality.” With this attitude, all kinds of work arrangements become feasible.

A second recurring theme in innovative approaches was *re-engineering jobs or creating job opportunities from scratch* in order to generate a reduced-load work arrangement. Managers discovered that this process often unleashed creative improvements in the functioning of the work unit beyond the specific position of concern and had unexpected benefits for overall unit productivity.

A third idea that came up several times was to *focus on creating a work environment where results, not “face-time,” was what really mattered*. Some managers mentioned they had to actually model leaving the office at a decent hour over a fairly long time frame before employees started getting the message that number of hours worked was not what counted.

Organization-Wide Suggestions. Four main themes surfaced in respondents' reflections on innovative ideas and practices in general around effective management of work and life.



Establishing new organizational mechanisms providing information, feedback, and facilitating discussions on flexibility. The most common theme mentioned by participants from 30% of the organizations related to the implementation of a process for providing information to employees and facilitating discussions about reduced-load work and flexible work arrangements. For instance, one organization had implemented a “Fit for You” forum that allowed employees and managers to discuss what types of work arrangements worked best for them. Another organization had developed a part-time forum or network of professionals who were working on a reduced-load basis to allow for information sharing and mutual support. The firm had other forums for other forms of diversity such

as ethnicity or sexual orientation and reduced-load work was seen as another diversity workforce form. Organizations also encouraged employees to discuss going on reduced-load with a career coach before talking with their managers, and they also provided individualized feedback to assist managers who are unsupportive of work-life issues.

Flexible Work Schedules. Participants from 25% of the organizations in our study mentioned that their organizations had initiated many kinds of flexible work schedules for employees. Flexible work schedules consisted of compressed work weeks; having core hours in the middle of the day (9:30–3:30) and allowing employees to flex their schedules around these hours; allowing employees to leave work early; and generally having variability in working hours.

Ad Hoc Virtual Work Participants from 20% of the employers mentioned increased use of virtual work arrangements on an ad hoc basis and allowing employees to participate in meetings virtually. They mentioned that this practice made reduced-load work less difficult to accommodate, because it meant that meetings didn't always have to be scheduled around employees not in the office every day.

Linking Reduced-Load Work with Human Resource Development. Three firms mentioned ways to link reduced-load work with human resource development systems. One employer “pro-rates” performance evaluations. Managers are told to look at results specifically based on the work load of the employee so that if an employee is only working a 60% workload, the employee is evaluated accordingly. Another employer took a somewhat different approach to evaluating reduced-load employees. Instead of specifically evaluating the employee based on his or her percent reduction, the employee is evaluated based on fewer objectives. A third firm makes it a priority that employees on reduced-load have equal access to the same human resource programs and career development opportunities that full-time employees do, so that their career opportunities are not jeopardized. Readers interested in seeing more discussion on issues of linking reduced-load work to human resource policies and strategies should refer to the benchmarking survey referenced at the end of this report (Kossek and Lee, 2005).

PART VI: METHODOLOGICAL NOTES

This report is part of a larger study lead by Mary Dean Lee of McGill University and Ellen Ernst Kossek of Michigan State University on Managing Professionals in New Work Forms, funded by the Alfred P. Sloan Foundation (Grant Number 2002-6-10). The research project was designed to promote greater understanding of how organizations are managing and integrating professionals working on a reduced-load basis. The focus of the larger study was on: a) following the career and personal life choices of reduced-load professionals over time; b) learning how managers approach and support reduced-load professionals reporting to them; and c) examining how new work forms among professionals are evolving in organizations that were experimenting with reduced-load arrangements 6 years ago. Web-based copies of this report may be downloaded for citation at no cost from <http://flex-work.lir.msu.edu/>. The following reports of earlier phases of this research project can also be downloaded from this website:

- *Crafting Lives that Work: A Six Year Retrospective on Reduced-Load Work in the Careers and Lives of Professionals and Managers*. This study followed the career and personal life choices of reduced-load professionals over time (Lee and Kossek, 2004).
- *Benchmarking Survey: A Snapshot of Human Resource Managers' Perspectives on Implementing Reduced-Load Work for Professionals*. This was a survey that provides a snapshot of implementation of reduced-load work practices and linkages to strategic HRM and human resource systems (Kossek and Lee, 2005).

Where relevant we draw on knowledge from these earlier reports in the current report.

The interviews were conducted by a team of five skilled researchers, all of whom have doctoral degrees in organizational behavior. Some of the interviews were conducted face to face and some by telephone. Nearly all the interviews were tape recorded and transcribed verbatim. They were conducted between November 2003 and May 2005. Data analyses were mostly qualitative. We analyzed the actual content - what people say and how they say it. Most analyses used one of two techniques: a modified form of "axial coding," where interviewers extracted all the material applying to the key themes listed above; and "grounded theory development," where new themes are identified while reading transcripts (Glaser, & Strauss 1967).

The rating of the overall success of the cases of reduced-load professionals discussed by the 41 managers were handled in the following manner. Two members of the research team independently rated each case after reviewing the relevant interview material according to the following criteria. The most successful cases (those rated '5') were those where there were clearly positive outcomes for the individual, the work unit, and the organization, and where the managers commented on promotions or other career achievements already received in spite of the individuals' reduced-load status. Those cases rated '4' were still described as highly successful from multiple stakeholder perspectives, but the managers mentioned there were limits to career development or career advancement as long as the individual stayed on reduced-load. Cases that were rated '3' were considered moderately successful in that they were working out okay for both the organization and the individual, but there were problems that emerged from time to time and had to be dealt with. Cases rated '2' were generally not considered successful, although there might be some positive

outcomes from the individual's perspective. Cases rated '1' were viewed as clear failure, where there were no positive outcomes from any stakeholder perspective. There was agreement between the two raters on 75% of the cases. The remaining 25% were jointly reviewed until the raters reached consensus on the appropriate rating.

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